

**Company:** \_\_\_\_\_ (hereinafter “Company”)

**Consultant:** Crown Investor Institute, LLC (hereinafter “Consultant”)

Upon execution this *Consulting Services Scope of Work* it shall become an Addendum to that certain Consulting Agreement (the “Agreement”) executed between the parties on \_\_\_\_\_ and is considered incorporated into and a part of that Agreement by reference.

**Definition of the Service:** A one-year (6 month minimum) consulting agreement where topics are defined by the Company (see below for recommendations from Consultant). This Addendum includes certain document packages including the customized property management agreement and owner housekeeping, ancillary and entity documents, Broad Standing Disclosure, managing 3<sup>rd</sup> party relationships, owner side revenue streams and Asset vs Property management documents; customized lease and tenant housekeeping and ancillary documents, tenant revenue streams, ; Scope of Service package; consulting time helping the Company implement the new strategies and documents; numerous training videos; access to Robert for calls regarding time-sensitive events Company needs assistance with; plus access to the Subscribers Dashboard and attendance to any workshops Consultant holds.

## Executing a One-Year Consulting Plan

When talking to new clients it’s often hard to answer the question “where do we go from here?” The following is our way of laying out a proposed 12-month plan for **putting our shoulder behind your company for a year** and unloading all we know about this business. The price **includes** the cost of many of our most popular forms and documents PLUS help implementing them. These 12 months would accelerate your company to the next level and make you a lot more money.

We’ve identified **what’s first** (what we think the priorities should be for the first four months) as well as options for other topics. You can change out and reprioritize anything you like based on your sense of what the priorities are for your company. Our experience is **the foundation of your business is the PMA so that should be first**, then the revisions (or review) of your lease and ancillary documents. You can change this around any time.

### Months 1-2

- Build a Customized PMA (or revise your existing document)
- Build Housekeeping (CYA) documents
- Build Ancillary documents
- Build Entity documents
- Add owner side revenue streams
- Clarify (or build a) Scope of Service
- Managing 3rd Party Relationships
- Asset Manager vs Property Manager
- Broad Standing Disclosure
- 54 training videos – NOT AVAILABLE TO THE PUBLIC
- This includes \$1,200 of document downloads

### Months 3-4

- Build a Customized Lease (or revise your existing document)
- Build Housekeeping (CYA) documents
- Build Ancillary documents
- Add tenant side revenue streams

This includes \$900 of documents  
Video training – NOT AVAILABLE TO THE PUBLIC

**Month**

Each month you get to select from the following list of additional topics

**Optional Topics**

- |   |   |
|---|---|
| Qualifying Guidelines   | Build a Lease Purchase program              |
| Service Animals & Comfort Pets                                | Build maintenance profit centers            |
| Training staff  | Build a Rent Recovery business              |
| Build a Tenant Handbook                                       | Managing Mold claims                        |
| Build an Owner Handbook                                       | Escrow account balancing                    |
| In-house training on PM topics<br>(with or without CE credit) | Build an Eviction Protection program        |
| Reports – Reports – Reports                                   | Using the 5-Year Lease                      |
| Getting ready to sell your company                            | Managing (preventing) move-out Disputes     |
| Review financial reports and tracking systems                 | Scheduled Maintenance Choices               |
| Review Office Tech Systems                                    | Tenant retention for more profits           |
| SEO / Website Customer Service Automation                     | Vendor documents                            |
| Employee documents and “spoil the staff” strategies           | Managing threats of (and actual) litigation |
| Or, YOU tell us what you want help with                       |   |

**Compensation:** \$500.00 a month paid in advance on the 1<sup>st</sup> of each month.

**Term:** 12 months (6 month minimum) beginning \_\_\_\_\_ but Company can terminate with 10 day notice **after the first six months (minimum of six months)**. If you join us mid-month we prorate the second month’s payment.

Agreed to this \_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

**COMPANY:** \_\_\_\_\_

**CONSULTANT: Crown Investor Institute, LLC**

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X \_\_\_\_\_

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